
In On Africa (IOA) Company Portfolio

June 2020



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Introduction to IOA





IOA Overview

IOA was formed in 2007 with the goal of becoming the global authority on African affairs.

2007 2015 2020

Founded as 'Consultancy Africa Intelligence'

Rebranded as 'In On Africa'



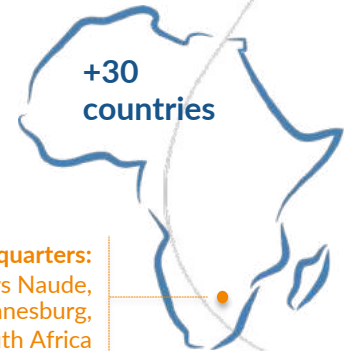
Connecting Africa's Potential



+300 expert consultants

More than 300 expert analysts, academics, researchers, social scientists, strategists, statisticians and editors who share their tremendous passion for Africa.

One of the top research and intelligence firms in and focused on Africa, with headquarters in Johannesburg and presence in over 30 African countries.



Headquarters:
146 Beyers Naude,
Johannesburg,
South Africa



A focus on all things African, ranging from market attractiveness studies and competitor intelligence to geopolitical and social research.



Our Philosophy – ‘Connecting Africa’s Potential’

“Our mission at IOA is to guide and inform data-driven decision-making with world class research and data analytics, in order to accelerate development in Africa. The relationship between quality research, good decision-making and development is what ‘Connecting Africa’s Potential’ is all about!”



Jonathan Mundell
CEO, In On Africa (IOA)





African Presence

- **IOA has consultant presence in 33 African markets** and also maintains strong strategic partnerships across the rest of the continent, with access to urban, peri-urban and rural areas.





Industry Coverage

- IOA conducts **B2C and B2B research and advisory projects** not just across the African continent, but also across most industries and sectors. Below are a selection of industries that we have covered in recent projects:



Automotive



Conflict, Risk &
Security



Education &
Training



Energy



Financial
Services



Food &
Agriculture



Healthcare



Infrastructure &
Construction



Innovation &
Sustainable
Development



Media &
Communications



Oil & Gas



Politics &
International
Relations



Real Estate &
Property
Development



Telecoms



Technology



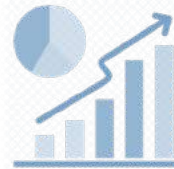
Service Offerings

- IOA's **four core competencies** are key to it fast becoming Africa's leading research, consultancy and publishing firm:

1. Primary & Secondary Research



2. Qualitative and Quantitative Analysis



3. Data Synthesis & Insight Extraction



4. Report Development & Publishing



- IOA's **consulting services** span all industries and sectors of the African continent, including:
 - Commercial landscape analyses
 - Competitor intelligence
 - Consumer research
 - Due diligence investigations
 - Election monitoring
 - Feasibility studies
 - Geopolitical research
 - Industry analysis
 - Market attractiveness studies
 - Market sizing and trend analysis
 - Media analysis
 - Opportunity assessments
 - Partnership identification and facilitation
 - Reputation and brand equity studies
 - Risk assessments
 - Social research
 - On-going customised intelligence briefings (daily, weekly, bi-monthly etc.)



Data Visualisation

- **IOA prides itself on its reporting, always prioritising clear, insight-driven and reader-friendly deliverables for our clients.** With more than 13 years of experience in report development and design, IOA has built up its own in-house report and publication design capacity.
- Reporting for clients is an ongoing process, with weekly, monthly and/or quarterly deliverables, as may be required.
- **IOA ensures clear, concise and visually-driven reporting through:**
 - Our experience in developing **infographic-based reports and publications**, ranging from our comprehensive Africa Country Benchmark Report (ACBR) to client publications that are largely infographic-oriented.
 - Our well-established relationship with SovTech – one of Johannesburg’s leading platform and web development companies – who headed up the development of IOA’s Voices Unite online research platform, which will incorporate **advanced online dashboards and real-time reporting.**
 - Our recent work in **geospatial mapping** and current development of three geospatial mapping platforms focused on African datasets.





Voices Unite

IOA is heading up a **ground-breaking youth-focused research platform** called Voices Unite.

- This digital platform was launched in **February 2020** with various partners around the country, such as tertiary institutions (e.g. University of Johannesburg), corporates (e.g. Sanlam), non-profits (e.g. Allan Gray Orbis Foundation) and government (e.g. NYDA).
- **Voices Unite will become the largest-ever deep-dive, research study with private and public tertiary students in South Africa**, targeting a nationally representative sample of more than 30,000.
- The platform **will be scaled across the African continent**, starting in 2021.

The screenshot displays the 'Voices Unite' dashboard. On the left is a dark sidebar with navigation options: Dashboard, Discussions, Rewards, Partners, Featured, and Blog. The main content area is titled 'Dashboard' and includes a user profile 'Steve Mthembu'. Below this is a 'Your Surveys' section with a grid of progress bars for various topics: About You (100%), Education and Skills Development (100%), Employment and Entrepreneurship (80%), Finance (80%), Healthcare and Lifestyle (30%), Infrastructure (0%), and Media and Technology (0%). To the right of the surveys is a 'Time Remaining' section showing a progress bar from 100 to 50 minutes, with a 'Next Milestone' to 'Answer 50 more questions'. Below that is 'Your Progress' showing 'Questions Answered in Total 300 Questions' and 'Total Medals Earned'. The 'Earn Rewards' section includes a 'Check available rewards' button. At the bottom is a 'Featured This Week' section with three news items: 'Voices Unite kicks off and goes viral!', 'Weekly Reward: Answer at least 50 questions this week...', and 'Rhodes University student unpacks what it means to decolonise curricula'.



Past and Present Clients



Testimonials

"IOA provided expert, efficient and flexible market and consumer research and analysis services for a large-scale project conducted across Southern Africa [...] Their insightful and analytical reports have guided the CIH group in our efforts to strengthen our market position in the region."

Gida Nakazibwe-Sekandi,
Executive Director
Capricorn Investment
Holdings (CIH)

"IOA did a fantastic job at collating market-related data to enable our Executive team to make informed strategy decisions. It was a joy to work with the IOA researchers - they are exceptionally professional and the translation and reporting on the data was incredibly valuable. We will definitely work with them again"

Cassandra Potgieter,
Business Manager:
Executive Management at
Cliffe Dekker Hofmeyr (CDH)

"I have been very impressed with the level of professional insight and quality of the monthly publications that have been presented over the past two years. Well-constructed, concise and pertinent to the overall business and security spectrum, thus clarifying current situations on the African continent."

Sean Weston,
Security Operations
Coordinator, Halliburton

"I hereby highly recommend the research and intelligence services of In On Africa (IOA). The research and analysis conducted by IOA was expertly implemented and results informed Motorola Solutions in the development of our future strategies for Africa. IOA delivered results above our expectations in the project."

Ricardo Gonzalez,
EMEA Strategy Director
Motorola Solutions Germany
GmbH

"A key research partner for Interbrand Africa across many clients and markets, In On Africa (IOA), has proven time and again that there is simply no substitute for smart, and IOA has this in buckets. We certainly look forward to our ongoing relationship within Interbrand Africa and our extended Intergroup companies."

Doug de Villiers,
Group CEO
Interbrand Africa

Methods and Techniques



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Repertoire of Research Methods & Techniques

IOA strongly believes in **mixed-method approaches to research**, and generally includes at least 2-3 of the following methods in client projects:

- **Consumer panels** - Consumer panels allow researchers to efficiently and quickly understand the views of a particular group. This is a tried and trusted IOA research methodology because it produces high response rates and provides specificity in the data collected. Changes in consumer preferences are easily deduced through this method, allowing researchers to swiftly respond to these changes. IOA works towards improving the participation of consumer panels through personalising the consumer's experience in tandem with increasing the diversity of respondents to reduce bias. IOA has access to one of the largest online research panels in Africa and is also currently rolling out a youth-focused research platform called Voices Unite.
- **Online surveys** - Owing to its many advantages such as ease of gathering data, minimal costs, flexibility of design and increase in response rates, IOA prefers to use online surveys as one of its core research methods. IOA has a professional license to one of the top research survey platforms around – SurveyGizmo. This allows for world class data security, a multitude of question options, advanced reporting and analytics capabilities, and more. Testing the survey questions, refining the time it takes to complete surveys and avoiding the use of ambiguous wording are a few other ways in which IOA continues to evolve its use of online surveys in order to increase the response rate.








Repertoire of Research Methods & Techniques

- **Social media monitoring** - A young research methodology, social media monitoring denotes the use of social media channels to gather and track data and information on a set of individuals or group. It allows companies to monitor their audience, competition and industry, affording them the opportunity learn about new trends and consumer problems. Through utilising this research methodology, IOA is able to ascertain more current and accurate data, strengthening its position as one of Africa's leading firms in market intelligence. IOA is improving this research methodology by constantly learning about and utilising new tools on the social media monitoring market such as Meltwater.
- **Desktop research** - IOA employs this research methodology for most projects because it allows the researcher to gain a broad understanding of the field of study and relevant insights, prior to the implementation of primary research. Desktop research is also cost effective, easily accessible and may sometimes answer the research question before spending time and money on unnecessary surveys and interview. IOA is constantly expanding its research databases and its access to relevant reports, articles and other documentation.
- **In-Depth Interviews (IDIs)** - A cornerstone of qualitative research, IDIs are open-ended interviews utilised to ascertain more detailed and rich findings on perceptions, attitudes and beliefs, generally conducted with key informant groups. IDIs are also a cornerstone of IOA's research methods owing to the comprehensive information which can be obtained through this method in comparison to other methodologies. IDIs allow the researcher to probe responses for a deeper understanding and gain additional knowledge.





Repertoire of Research Methods & Techniques

- **Focus groups** - A commonly used qualitative research method, focus groups are often used by companies for marketing purposes. IOA utilises focus groups because it allows for multiple perspectives on the same topic or research problem. The researcher is able to approach the research topic from multiple perspectives and also get information from non-verbal responses such as facial expressions and/or body language. Despite the value of focus groups, IOA is moving away from traditional focus groups towards utilising online focus groups.

- **Online focus groups (aka Market Research Online Communities)** - An increasingly popular alternative to traditional focus groups, online focus groups allow respondents to discuss and debate a specific topic through the internet. In addition to the aforementioned benefits of traditional focus groups, online focus groups are beneficial because they are convenient, time and cost efficient. IOA employs this research method because it allows the researcher to administer focus groups with participants that are geographically disparate.

- **CAPI and CATI** - CAPI denotes a face-to-face method of data collection where the interviewer utilises a mobile phone, table or computer to record the answers given during an interview. Similarly, CATI is the same kind of interview, but conducted telephonically. In a context like South Africa where the majority of people live in poverty, CAPI and CATI enable IOA to do research in poor and marginalised communities. This research methodology is also good for capturing sensitive data and has a relatively quick turnaround time. While both CAPI and CATI provide a number of benefits when conducting research in South Africa, IOA is increasingly moving towards utilising online research platforms.


Online Panel





Full cycle Research – Quick and Effective

1

POPULATION AND SAMPLING

Ability to target any demographic group for any research study

DESIGN AND SAMPLING

Design and programme online surveys

2

3

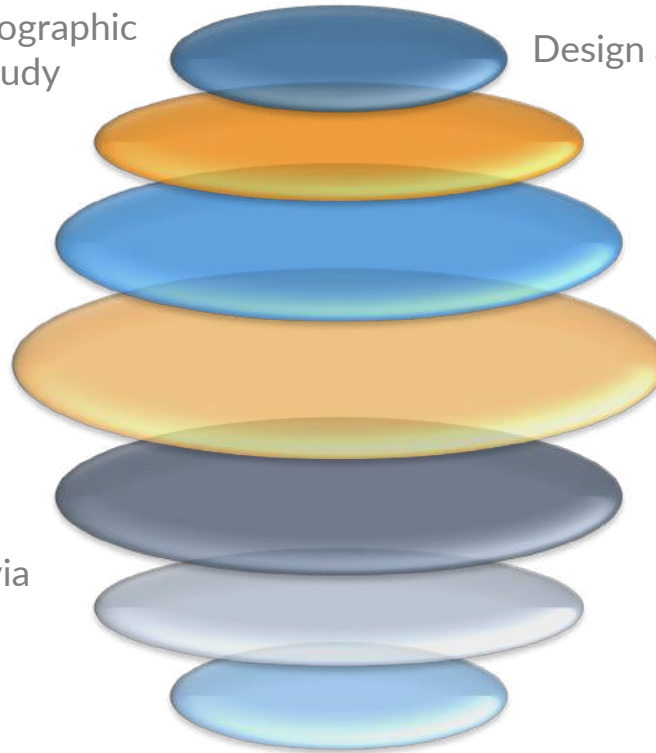
DISTRIBUTION AND COLLECTION

Deploy research invites via Email and SMS

ANALYSIS AND REPORTING

Turn data into insights with intuitive survey reports and dashboards

4



Over 270K active online research panelists



270K+

New panelist monthly growth



10K+

In-depth verified profiling with over 80 fields



80+ Datapoints

Active in South Africa, Kenya, Nigeria and Ghana

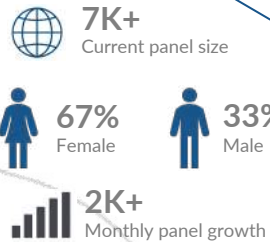


10 Market

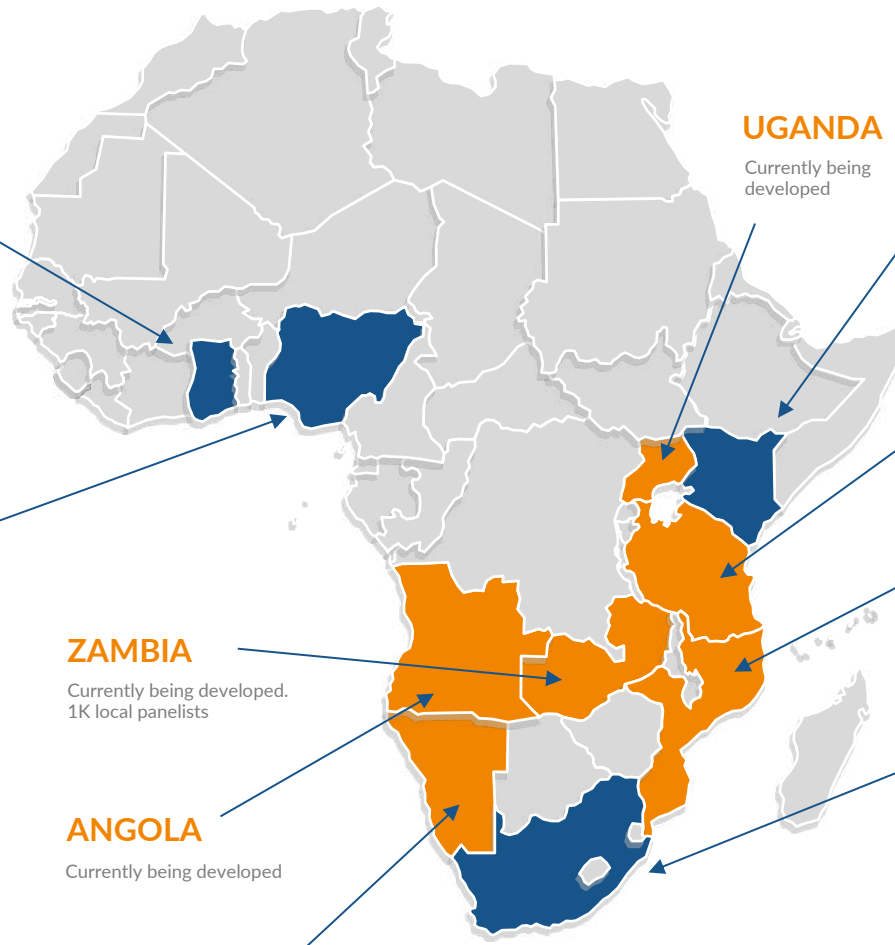
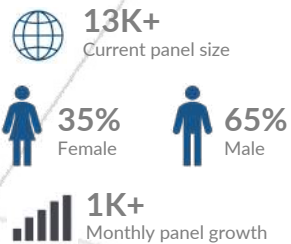


Full cycle Research – Quick and Effective

GHANA



NIGERIA



ZAMBIA

Currently being developed.
1K local panelists

ANGOLA

Currently being developed

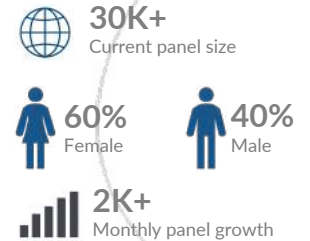
NAMIBIA

Currently being developed.
2.5K local panelists

UGANDA

Currently being developed

KENYA



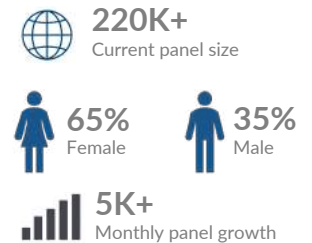
TANZANIA

Currently being developed. 5K local panelists

MOZAMBIQUE

Currently being developed. 1.5K local panelists

SOUTH AFRICA





What Makes It Tick?



REACH

IOA and our partner network own online research panels in South Africa and other African markets



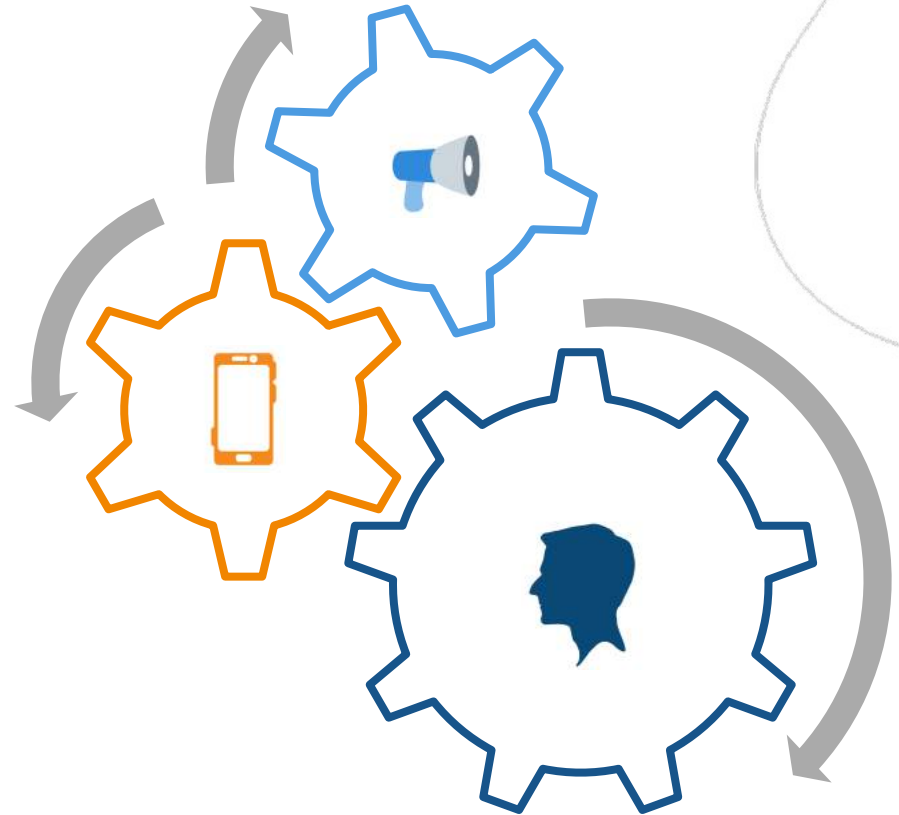
TECHNOLOGIES

We utilise various online technologies to ensure speed, security, authenticity, validity and research quality



PROFILING

We are capable of profiling our online panels across 80+ verified data-points including age, gender, ethnicity, region, home ownership and employment among others



Team & Partners





IOA Leadership Team



CEO - Jonathan Mundell

Jonathan co-founded what was originally Consultancy Africa Intelligence (CAI) in 2007, and built the company into one of the leading Africa-focused research firms on the continent. As the firm grew, CAI was rebranded as In On Africa (IOA) in 2015, emphasising its presence in and focus on Africa.

Jonathan has been involved in Africa-focused research (quantitative and qualitative) and consultancy for more than 15 years, working primarily through IOA and previously with the University of Pretoria, Yale University and the Medical Research Council (MRC) of South Africa.

Jonathan has vast experience in overseeing large scale, multi-country research projects in Africa, including policy research, opportunities assessments, brand tracking, reputation research, consumer research and various digitally focused research studies.

In the SME and entrepreneurship space, Jonathan has overseen projects for various clients including Fetola, Catalyst for Growth (C4G), Heavy Chef, SME SA, the Thabo Mbeki Foundation, the GIZ, and is the Founder of Voices Unite. He is also himself a successful entrepreneur passionate about youth development and youth entrepreneurship, having started IOA at the age of just 25.

In addition, Jonathan has overseen large-scale research and advisory projects for clients such as the African Union, Caterpillar, Deloitte, Ernst & Young, First Bank the GIZ, GroupM, G4S, Interbrand, Motorola, Nedbank, PwC, Standard Bank and various governments and embassies.



IOA Leadership Team



Associate Director – Ogi Williams

Ogi has been with IOA for five years and has extensive experience in research, qualitative and quantitative data analysis, project management and reporting. His research experience has covered the majority of the African continent, with numerous projects focused on small businesses business growth and market expansion.

Ogi has managed research teams in the data gathering and analysis processes in various multi-country research projects, including recent commercial landscape assessments, opportunity assessments, industry research and competitor intelligence.

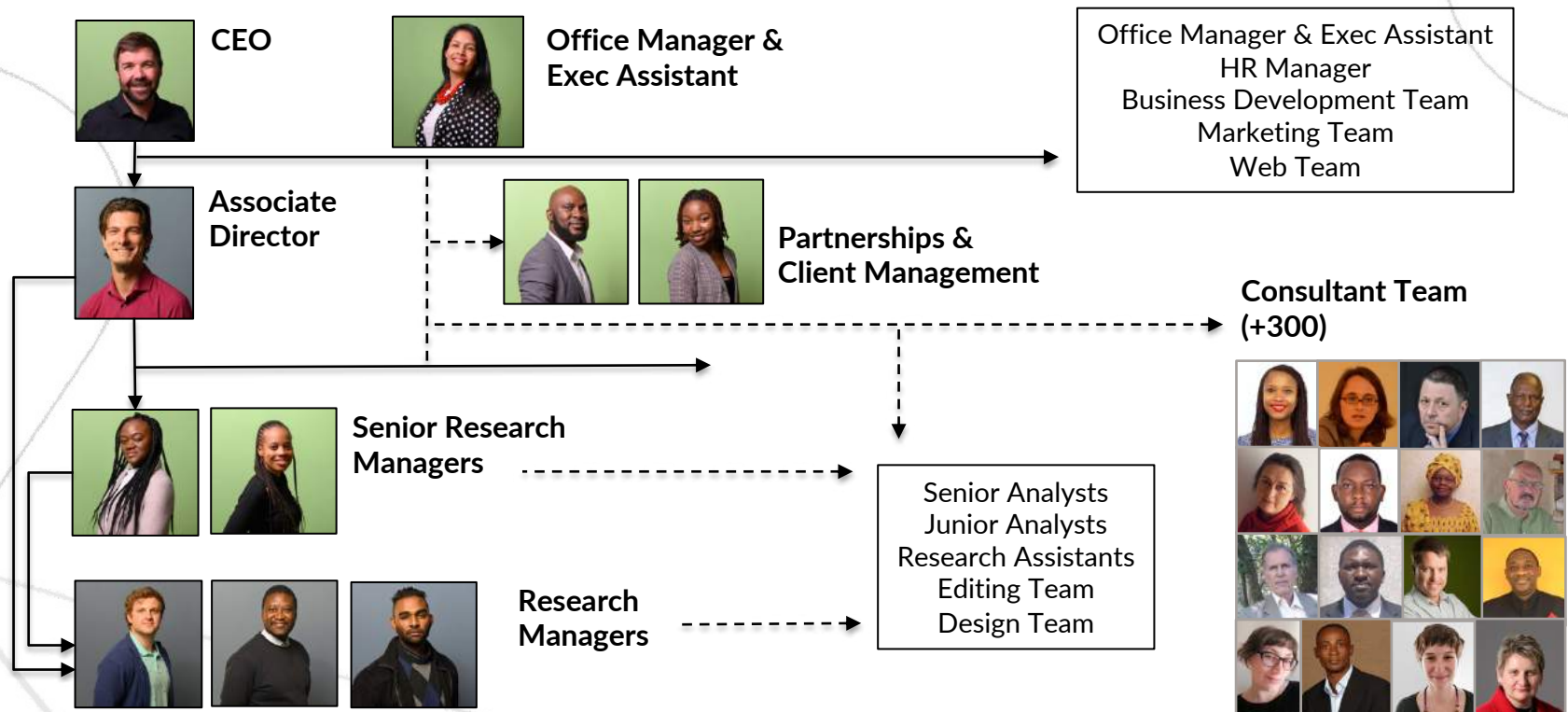
Ogi has sizeable research experience within education and entrepreneurship, including a 2-year study for Henley Business School with a focus on business education aimed at driving growth in entrepreneurship. Other experience with IOA includes projects focused on policy analysis and various multi-country research studies for major African law firms such as CDH and Adams & Adams. Over the past few years, Ogi has overseen legal oriented research in close to 15 African countries.

Ogi has also managed large-scale research projects such as a 47-country market attractiveness study focusing on the automotive and car insurance industries and a yearlong, 6-country landscape assessment conducted for the Japanese Bank for International Cooperation (JBIC) with a focus on infrastructure development. His other work has focused on aspects of the energy, banking, oil & gas, youth and education sectors amongst others, and he continues to be involved in other facets of research and analysis regarding developing markets in Africa.



Team Structure Summary

- **IOA will bring together a multi-disciplinary team** of qualitative and quantitative data analysts, desktop and field researchers, writers, research assistants, developers, designers and editors to work with the AfDB on its project requests.
- The IOA team consists of +30 full-time staff, +300 consultants and various strategic partners across the continent. **In summary, the team is structured as follows:**





Partnerships

- IOA maintains strong and wide-ranging partnerships across the continent, including strategic research partners in more than 20 African countries. Below are a selection of some of our partners:

Field research partners

...whom we work with on CAPI, CATI and IDI research e.g.

Kantar TNS, Ask Africa and Field Africa

Geospatial research partners

...whom we work with on geospatial mapping projects e.g.

AfricaScope

Digital research partners

...whom we work with on digital panel research projects e.g.

InsiTEQ, JAG and our own platform, Voices Unite.

Academic partners

...whom we work with on youth, education and other research projects e.g.

UJ, Uni-Ven, Henley, SACAP and various others

NPO partners

...whom we work with on youth development and SME development projects e.g.

Allan Gray Orbis Foundation, SAB Foundation, Kagiso Trust, Catalyst 4 Growth and Beulah Africa

Consulting partners

...through whom we are sub-contracted e.g.

Adams & Adams, BDO, Fetola and Kantar Consulting

Technology partners

...with whom we (a) are building a digital research platform (SovTech), (b) conduct social media monitoring research (Meltwater), and (c) develop web surveys (SurveyGizmo)

Government partner

...with whom we do youth development research (NYDA)

Research Project Examples



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An In-Depth Landscape Assessment



- **Project:** Multi-country landscape assessment on infrastructure development
- **Client:** An international development agency
- **Countries:** Angola, Ethiopia, Kenya, South Africa, Mozambique and Tanzania
- **Summary:** Comprehensive assessments of infrastructure development opportunities in six African countries with a focus on four sectors – energy, transportation, water and telecommunications. The research was conducted in February-April 2018 and involved more than 60 in-depth interviews, coupled with exhaustive desktop research, to inform detailed research reports of approx. 100 pages for each country.

These country-specific reports include detailed assessments of the following:

Policy Landscape:

Assessment of infrastructure-related policies, government capabilities and commitments, state of public finances, donor relations, key political figures, etc.

Legal and Regulatory Framework:

Overview of relevant laws, regulations, procurement process, barriers to trade, impact assessment standards, governing bodies, etc.

Historical Risk Assessment:

Overview of past expropriation, nationalisation, forced closure, repossession, law changes, discrimination, material breach, sanctions, civil war, etc.

Microeconomic Analysis:

Assessment of the market size, supply and demand, growth prospects, opportunities within each focus sector.

Partner and Competitor Assessment:

Detailed analysis of major players, competitors, recent bids, partnership opportunities and related factors of interest to the client.



A Market Attractiveness Study



- **Project:** Continent-wide market attractiveness study
- **Client:** Multinational corporation in the automotive sector
- **Countries:** 47 countries (all of Sub-Saharan Africa)
- **Summary:** Primary and secondary research assessing twelve relevant criteria to rank the countries according to market attractiveness in order to inform the client on opportunities and strategies for market-entry across the African continent. These criteria included data specific to the automotive sector, insurance-related data, business indicators, political indices and economic indices.

Below is an example of one of the 47 country profiles (Angola, ranked #17) developed as part of this study.





Expansion Strategy Research



- **Project:** Multi-country expansion strategy research
- **Client:** Top-4 law firm in South Africa
- **Countries:** Ghana, Kenya, Mauritius, Nigeria and Tanzania
- **Summary:** Primary and secondary research conducted in early 2018 in all five markets that included in-depth interviews with 20 competitor law firms and various other key informants, as well as the assessment of 300 law firms in these markets in total.

A range of strategic recommendations were provided to the client to guide their expansion strategy, including which of the five countries to prioritise, partnership opportunities, competitor intelligence and policy and regulatory advice.

The research focused on three overarching areas of investigation:

General law firm landscape per country...

inclusive of number of law firms, size of law firms, partner count per law firm, compensation models, and relevant practice areas / expertise.

Competitor presence assessment...

of both SA and international firms – per country, inclusive of business models employed

Relevant society rules and restrictions...

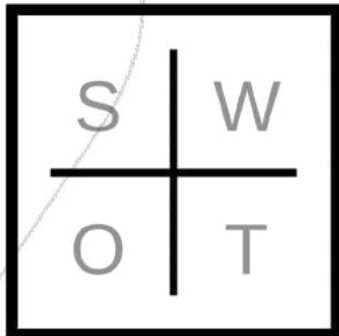
on establishing a law firm in each jurisdiction, including ownership in a domestic law firm, and restrictions on use of names, among other aspect.



Competitor and Market Research



- **Project:** Highly sensitive competitor and market research
- **Client:** A multinational telecoms company
- **Countries:** Nigeria and Ethiopia
- **Summary:** The research team sourced and reviewed a total of more than 650 documents and conducted a total of 54 in-depth interviews (22 in Ethiopia and 32 in Nigeria). These included interviews with, for example:
 - **In Nigeria** – Comptroller-General at Nigeria’s Federal Fire Service, the Chairman of Nigeria’s Forum of Spokespersons of Security and Response Agencies (FOSSRA), the Chairman of the Nigerian House of Representatives (Telecommunications), CEO of the Nigerian Airspace Management Agency
 - **In Ethiopia** - Ethiopia’s Minister of Communication and Information Technology, the ICT Commissioner of Ethiopia’s Addis Ababa City Police, Communications Chief at Ethiopia’s Civil Aviation Authority.



Utilising the information and related insights gathered through the 54 IDIs as well as through the desktop research, we conducted expert thematic and trend analysis, together with the implementation of a PEST Analysis, SWOT Analysis, SPACE Matrix and Strategy Diamond assessment.



Consumer Research and Market-Sizing



- **Project:** Telecoms market-sizing research
- **Client:** Major South African telecoms company
- **Countries:** South Africa
- **Summary:** Primary and secondary research to equip the client with deep understanding of its key customer segments of interest. The research aimed to make clear who these segments are, what they like, what they do or think, in order for the client to grow and increase user share based on this understanding.

The project covered a wide range of key data points and insights to guide the client's decision-making, such as:

Technology product trends	Key competitors in the market, including competitor appeal	Demographics, where they live, dwelling type, education, employment	Consumer spending on telecommunications products	Decline in data prices versus consumer income growth
Financial inclusion rates e.g. growing usage of internet banking	Population growth projections	Access to and penetration of internet services	Usage of wi-fi, including free wi-fi	Social media penetration, usage and growth trends
	National 3G coverage and mobile subscription rates	Assessment of industry drivers and challenges	Economic opportunity for client, including and highlighting SWOT indicators	



In-Depth Global Stakeholder Assessment



- **Project:** Multi-country stakeholder assessment within chromium industry
- **Client:** An international development association
- **Countries:** China, Finland, France, Kazakhstan, Germany, India, Japan, Russia, South Africa, Turkey, UK, US
- **Summary:** Comprehensive assessments of stakeholder experiences as members of the international association. The research was conducted over the course of February-April 2019 and involved 20 in-depth interviews with stakeholders from around the world. The research aimed to assess a number of key areas that the association required feedback on to improve the delivery of relevant services to members. The core focus areas are briefly outlined below.

Progress made in catering for the needs to the mining sub-industry

Views on the association's ability to achieve its mandated objectives

Views on areas for improvement in terms of service delivery to members

Additional areas that need to be focused on in the near-future

Member expectations of the association at present and going forward

Strategies on what the association can to protect / promote the industry in the future



Large-Scale Consumer Research Studies



- **Project:** Large-scale brand tracker research
- **Client:** Major player in the Southern African banking industry
- **Countries:** Lesotho, Malawi, Namibia and Swaziland
- **Summary:** The research involved web surveys with more than 650 employees, face-to-face interviews with more than 1,700 customers, an exhaustive desktop research study and in-depth qualitative and quantitative data analysis and reporting.



- **Project:** Multi-phase internal and external research
- **Client:** Major player in the Nigerian banking industry
- **Countries:** Nigeria
- **Summary:** Two separate research projects were carried out, surveying close to 1,000 respondents. The first assessed employee sentiment around a company merger utilising web surveys and the second study assessed the perception of the bank across multiple respondent groups.



- **Project:** Large-scale customer and brand research
- **Client:** Major player in the Southern African financial services sector
- **Countries:** Botswana, Namibia, South Africa and Zambia
- **Summary:** IOA used an assortment of research methodologies, including 450 face-to-face interviews, a web survey of 600 clients, panel research with 150 respondents and 22 in-depth telephonic interviews with key informants.



Various Studies on Power & Energy in Africa



- **Project:** Qualitative and quantitative consumer research
- **Client:** A multinational company in the energy sector
- **Countries:** South Africa and Nigeria
- **Summary:** The research focused on the client's current and potential operations Nigeria and South Africa, involving an opportunity analysis coupled with reputational research, conducted through face-to-face and telephonic interviews, as well as web surveys.



- **Project:** A monthly series entitled the 'Africa Energy Monitor'
- **Client:** Government client
- **Countries:** Africa-wide
- **Summary:** The series was provided to a government client, inclusive of analytical assessments of and insights into Africa's energy sector. The report analysed general trends across African energy sectors, as well as more in-depth assessments of ongoing developments.



- **Project:** 5-year series of intelligence reports on Africa and nuclear energy
- **Client:** Government client
- **Countries:** Africa-wide
- **Summary:** The series interrogated nuclear energy and counter proliferation in Africa. Reports in the series (more than 50) covered topics ranging from analyses of African countries' nuclear plans to assessments of new policies, foreign relations, investment and proliferation risks.



Agriculture, Food Processing and Waste



- **Project:** Analysis of Angola's Food Industry
- **Client:** Sub-contracted by one of the Big 4 auditing firms
- **Countries:** Angola
- **Summary:** The project aimed (through primary and secondary research) to identify consumer demand trends, key players, risks, and financial incentives within the industry. The study also assessed Angola's legal and import-export policies and frameworks, value and supply chains, distribution channels and current and prospective competition.



- **Project:** Comprehensive market and opportunity assessment
- **Client:** European client interested in agri-food processing industry
- **Countries:** Continent-wide
- **Summary:** The research focused on opportunities for the client to establish trade shows and exhibitions with a focus agri-food processing in Africa. The research an exhaustive desktop research study coupled with more than 40 stakeholder interviews.



- **Project:** Assessment of South Africa's recycling industry
- **Client:** Sub-contracted by one of the Big 4 auditing firms
- **Countries:** South Africa, with a high-level continental assessment
- **Summary:** The project aimed to identify opportunities for the client to expand within South Africa's recycling industry and to tap into sub-industries not yet being fully incorporated into traditional recycling business models. The assessment included 40 in-depth interviews.

Business, Investment and Security Intelligence



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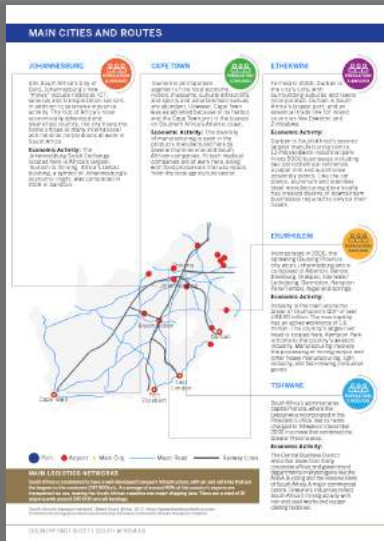
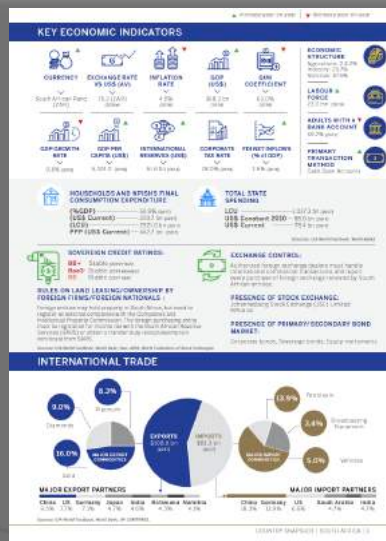
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Multi-Country Investment Research & Reports



- **Project:** Continent-wide investment research and reports
 - **Client:** Standard Bank
 - **Countries:** 20 sub-Saharan African countries
 - **Summary:** Primary and secondary research on 20 SSA countries focusing on international investment and business expansion in Africa, providing the client with insight on the business services landscape for international businesses, coupled with an in-depth assessment of the approaches, partnership models, timeframes and costs of entry and expansion in Africa
- In addition to the above research, IOA also developed country profiles on these 20 markets, outlining macro-economic data, transport routes, sector opportunities, market attractiveness factors, risks and more. Below are some extracts from one of these reports:





Examples of On-going Intelligence Briefings



- **Project:** A fortnightly series entitled the 'Fortnightly Insight'
- **Client:** Government client
- **Countries:** Africa-wide
- **Summary:** The series provided on-going insights into Africa's evolving business, economic and political landscapes, detailing relevant trends and developments across the continent to guide the client in its ongoing relations, trade and investment in Africa.



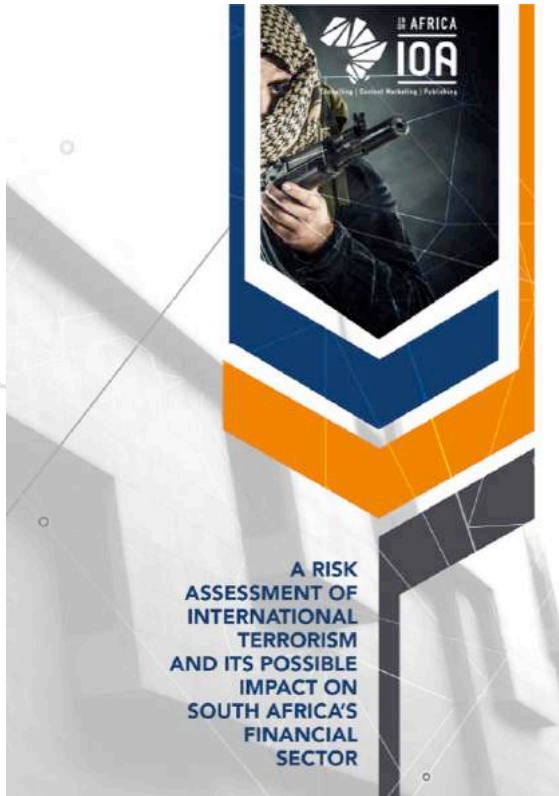
- **Project:** A monthly series entitled the 'China in Africa Series'
- **Client:** Government client
- **Countries:** Africa-wide
- **Summary:** The series provided on-going insights into China's involvement in Africa including reports on topics such as China's evolving African foreign policy, assessments of China-Africa trade, and commentary on China's leadership relating to African cooperation.



- **Project:** On-demand briefings focusing on various topics
- **Client:** International humanitarian organisations
- **Countries:** North and West Africa
- **Summary:** The papers informed the client of relevant trends, developments and prognoses relating to current and potential humanitarian threats in Africa e.g. an assessment of the state of security along the Tunisia-Libya border and roadblocks for humanitarian assistance in Niger.



A Commissioned Intelligence Report



In 2016/17 IOA was commissioned by a multinational financial services firm to execute research that aimed to provide a comprehensive risk assessment of international terrorism and the possible impact of terrorism on South Africa's financial services sector in the medium to long-term.

Core focus areas included:

- Current and potential future terrorist threats to SA
- Factors surrounding radicalisation and de-radicalisation
- Current and future political and social risk factors
- Knock-on effects of political instability, economic volatility, and social unrest
- Evident trends in ATM, bank, and armoured vehicle security threats
- Trends of cybercrime
- Potential for banking institutions to be used to channel funds for terrorism and terrorist activities
- Provision of information with regard to international best practice for financial institutions that actively mitigate against the threats and impact associated with terrorism.



Africa Conflict Monitor (ACM)

Published by IOA from 2010-2017



IOA's Africa Conflict Monitor (ACM) was published from 2010-2017 and analysed conflict-related developments and trends across the African continent. Specialist insight and commentary on African conflict and conflict resolution was augmented with updates on key recent developments, regional overviews, infographics and prognoses.

ACM expertly synthesised historical context, current dynamics and future prognoses into an intelligible and informative conflict and terrorism report that was read by government heads, corporate leaders and major international organisations around the world.

Below is a testimonial from long-time ACM subscriber, Sean Weston, from Halliburton:

ACM subscriber Sean Weston, Oil and Gas Security Operations

As a subscriber to the Africa Conflict Monitor (ACM) I have been very impressed with the level of professional insight and quality of the monthly publications that have been presented over the past two years. Well-constructed, concise and pertinent to the overall business and security spectrum, ACM has provided me with the understanding needed in a no-nonsense way, thus clarifying current situations on the African continent. This in turn allowed me to analyze the security profile relevant to my Company's operations within certain conflict zones.

ACM – through their local knowledge and understanding of Africa in general – have unearthed important information that others have been unable to find using standard processes.

Download a sample of ACM here:
<https://tinyurl.com/y736oenu>

Youth & SME-Focused Research





Tertiary Education and Skills Needs Assessment



- **Project:** Assessment of the tertiary landscape and corporate skills needs
- **Client:** An international business school
- **Countries:** South Africa
- **Summary:** Over the course of the past 2 years, IOA has worked closely with this client in assessing the current environment pertaining to tertiary education, skills development, corporate skills needs and training in South Africa.

The research has involved more than 100 in-depth interviews, coupled with exhaustive literature reviews, web surveys and online panels, all of which have been used to inform the client on strategy and curriculum development in expanding their operations within the South African tertiary education market.

The research has covered, among other topics:

The current state of tertiary education

Corporate skills needs and gaps

Future trends in skills requirements

Key considerations regarding the future world of work

Soft and technological skills requirements of the future

Corporate demand for leadership skills

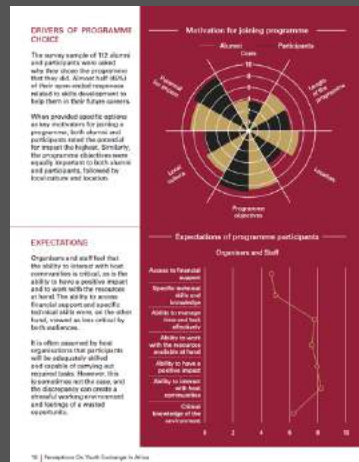
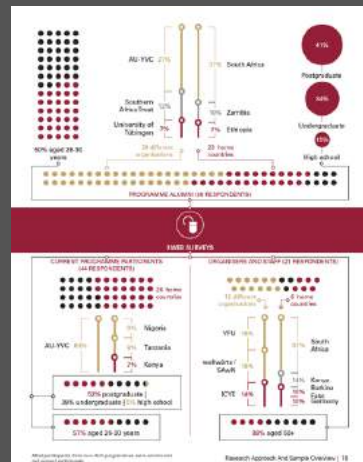
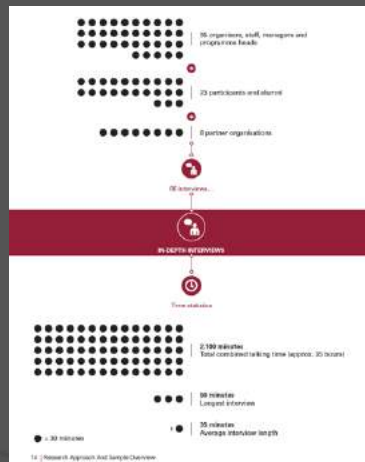
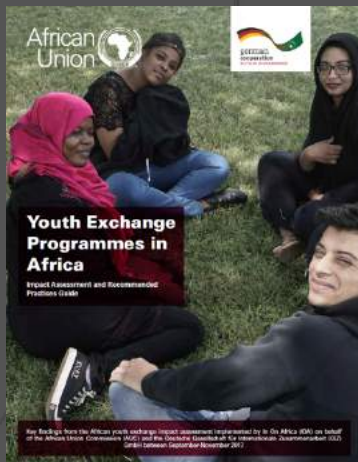
The need for bridging programmes



A Youth-Focused Impact Assessment



- **Project:** Continent-wide impact assessment of youth exchange programmes
 - **Client:** African Union and GIZ
 - **Countries:** Continent-wide
 - **Summary:** IOA was contracted to conduct a continent-wide impact assessment of youth exchange programmes in Africa, aiming to inform the design and quality of future youth exchange programmes, as well as the policy dialogue related to skills-promoting exchanges in Africa.
- This research involved more than 60 in-depth qualitative interviews, three online surveys and an exhaustive desktop research study. IOA subsequently worked with the GIZ and AU on a publication summarising the results of the research. This publication was publicly released by IOA and the AU in June 2018.



Download the full report at:

<http://www.inonafrica.com/agvi-publication>



Assessing the SME Landscape in South Africa

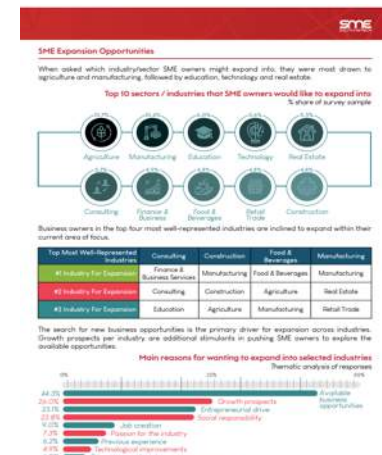
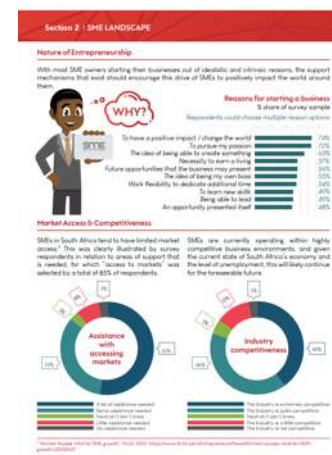
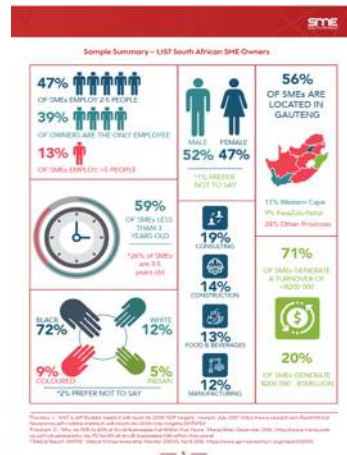


- **Project:** Challenges, Opportunities, Risks and Next Steps
- **Client:** SME South Africa
- **Countries:** South Africa
- **Summary:** The South African government has prioritised small business development with the objective of creating 11 million jobs by 2030 to reduce the country's chronic and high unemployment rate, and looking to SMEs to create these jobs and stimulate economic growth.

SME SA in collaboration with In On Africa (IOA) has endeavoured to assess the current environment in which SMEs operate through executing nationwide research on the sector. The aim of the research was to shed light on the challenges, opportunities and risks that need to be considered in the development of the SME sector to ensure the much needed growth and new employment opportunities in the country.



Published research by IOA and SME SA on 'South Africa's SME Landscape':
<https://www.inonafrika.com/sme-south-africa-report/>





Needs and Gap Analysis for SMEs across Africa



- **Project:** SME Landscape in Africa
- **Client:** Global Business Roundtable
- **Countries:** South Africa, Ghana, Nigeria, Benin, Cameroon, Congo Republic, Cote d'Ivoire, Zambia, Botswana and eSwatini
- **Summary:** IOA conducted primary and secondary research to equip the client with deep understanding of the SME landscape in ten African countries. The research aimed to make clear who these SMEs are, how many they are, what they do, what education they need, their strengths and weaknesses.

The project covered a wide range of key data points and insights to guide the client's decision-making, such as:

Number of SMEs

Size and Maturity
of SMEs

Key SME Industries
and sectors

Entrepreneurship
trends

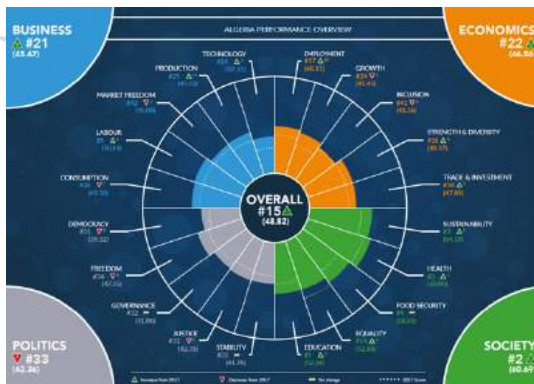
Insights for other
SME development
reports.

Recent Publications





Africa Country Benchmark Report (ACBR)



“The Definitive Resource for Understanding Africa”

In On Africa (IOA) released the third edition of the Africa Country Benchmark Report (ACBR) in August 2019. The ACBR is a groundbreaking 500+ page publication, which provides a comprehensive assessment of 54 African countries.

The report scores, ranks and insightfully assesses each African country holistically, as well as across ACBR’s four ‘quadrants’: Business, Economics, Politics and Society. Hundreds of infographics, more than 25,000 data points, and critical insights make the ACBR an essential tool to better understand Africa.

More than 20,000 readers worldwide

ACBR is read by CEOs, government heads and international organisations around the world. Our readership surpassed 20,000 in 2017, and included (among many others) UNFP, WHO, World Bank, the DBSA, Eskom, various US and European businesses interested in Africa, and governments and embassies around the globe

Find out more about ACBR through IOA’s website:
www.inonafrica.com



Education in the Age of the 21st Century



Responding to the challenges and opportunities of the 4IR

During an event held by the Thabo Mbeki Foundation (TMF) in 2018, former President Mbeki stressed the importance of the 4IR for Africa, and expressed concern about whether South Africans in general, and educators in particular, are adequately prepared to respond to the challenges of the 4IR.

In response to Mbeki's call, the TMF contracted IOA to lead a comprehensive research assessment and analytical work, aimed at informing a multi-stakeholder Working Group comprising of academics, educators, policymakers, civil society and thought-leaders.

The objective was to tackle the complex question of what practical steps South Africa, and Africa in general, needs to take to build a foundation for a successful transition into the 4IR.

Main focus areas included:

- Teacher Education and Continuous Development
- Governance and Systems Support
- Policy and Curriculum Design
- Community and Stakeholder Mobilisation
- Innovation in Education Delivery
- Education as an Economic Driver

Published research by IOA and the Thabo Mbeki Foundation

<https://www.inonafrica.com/education-in-the-age-of-the-21st-century/>



The Africa Media Index (AMI)



Africa's first index on the media industry

The Africa Media Index (AMI) comprises data from 14 African countries and aims to provide consistent and reliable information to give a clear understanding of the media landscape across the continent.

The index highlights differences and similarities between the focus markets and provides a comparative view in terms of five specific dimensions, relevant to understanding a country's media environment:

The 5 AMI dimensions:

1. Economy and Business
2. Media Landscape
3. Media Consumers
4. Technology
5. Governance and Legislation

The score and rankings assigned to each country are informed by statistical calculations that combine each country's performance in the five dimensions.



Download the AMI here:

<https://www.inonafrica.com/africa-media-index-report/>



Assessing the Future of Work in South Africa



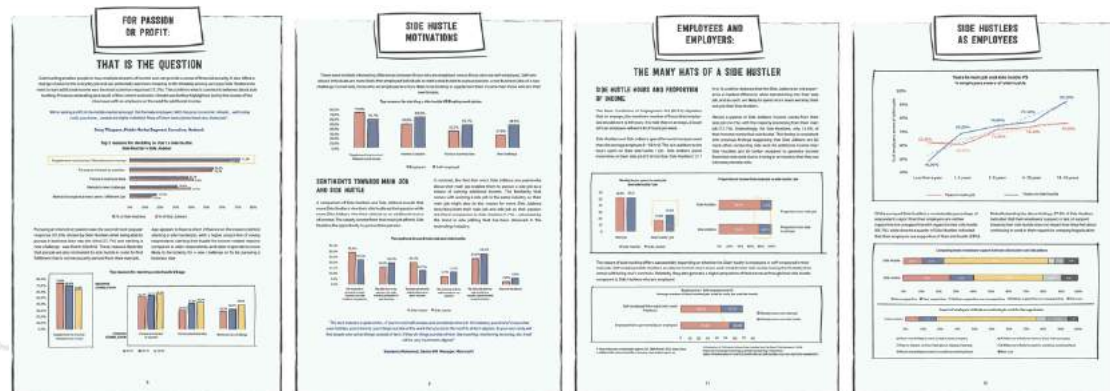
With the current challenges in economic climate South Africans are increasingly looking to broaden their horizons into additional work opportunities. The advent of working on the side is becoming increasingly prevalent, whether it's driven by a need to generate additional income, or in search of more engaging and stimulating work.

But what is the prevalence of side hustling, and what are the likely impacts on the broader economy?

IOA in collaboration with Henley Business School has looked to assess the nature and proliferation of work on the side in the context of South Africa. The research aimed to delve into various drivers of side-hustling, the hourly commitments to pursuing a side venture, as well as the views coming from both employees and employers on the topic.

Published research by IOA and Henley on the 'Side Hustle Economy':

<https://www.inonafrica.com/side-hustle-research-report/>

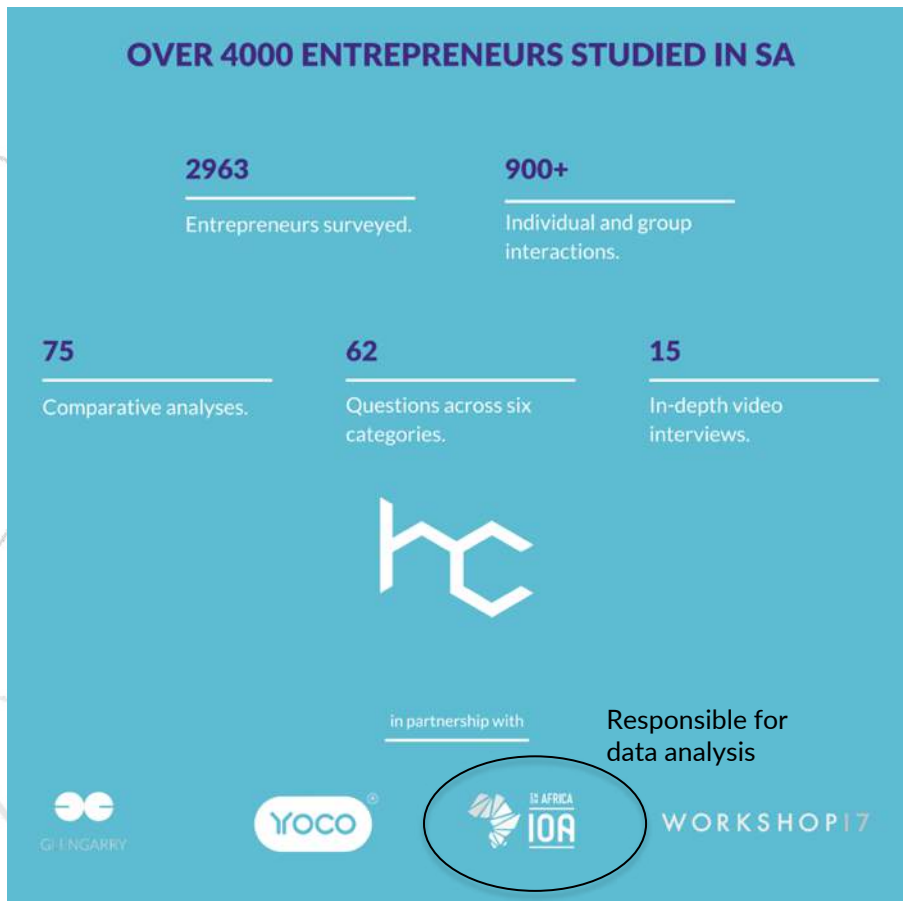




Entrepreneur Education Survey



- **Project:** Learning Habits of South Africa's Entrepreneurs
- **Client:** Heavy Chef
- **Countries:** South Africa
- **Summary:** In 2019, Heavy Chef Foundation in collaboration with In On Africa (IOA) embarked on the largest ever SA entrepreneurship education study to assess how, why, where and when entrepreneurs learn.



Download the summary report here:

<https://static1.squarespace.com/static/58bb1eac725e258dbeb80b2c/t/5da4d48e4c18b6612f3d4a6b/1571083427301/2019-Heavy+Chef-Entrepreneur+Education-Survey.pdf>



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